

Managing Position Data Overview

Positions are required and tracked, regardless of whether they are vacant or filled. Positions are created before an employee is hired. Once an employee is hired, they are associated to the position for which they were hired, and additional job data information is completed. The job data information inherits the position data that is selected at the time of adding a new hire or when moving an employee into a new position. Details or information regarding the position are first changed at the position level and are then conveyed to the associated employee's job data record.

Positions are created for all employees. Cardinal position management supports Human Resources, Benefits, Time and Attendance, and Payroll. COVA uses positions to track the details of a specific job in a specific department or location that typically has a one-to-one relationship with employees. Data is attached to the positions, and employees move in and out of those positions. If a Pay reduction is required make sure it is in accordance with DHRM Policy 1.60 and 3.05 and use Position action of POS/DIP.

Agencies will continue to utilize agency-specific systems or paper forms outside of Cardinal to capture position information and route for approvals (e.g., agency budget, HR approvals) within the agency.

If a new Job Code is required, work with DHRM to add the required Job Code prior to trying to enter the new position. If a Job Code is changed on a position that affects an incumbent, it may be required to then enter the related compensation change on the incumbents job record.

Review the ChartField distribution when changing position attributes. This data is exclusively maintained by employees with security access to the Department Budget Table.

The position number is unique for each agency and begins with the Cardinal three-digit Company code that represents the Agency. The position number is needed before adding or cloning a position.

Note: On the position, there is a confidential position checkbox. If confidential position is checked, neither the position nor incumbents will be reported out in the Active directory or employee directory extracts. (e. g. Undercover officers)





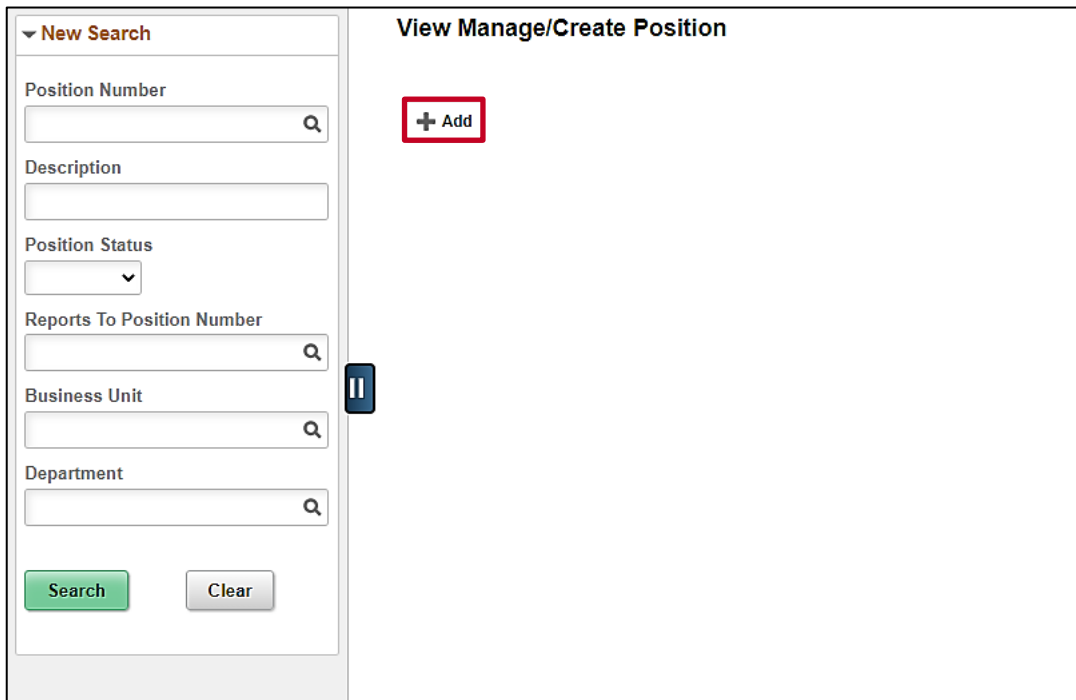
Table of Contents

Creating a Position.....	4
Cloning a Position	24
Update Existing Employee Position Data	28

Creating a Position


- To create a new position, navigate to the **Manage/Create Position** page using the following path:

Navigator > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position



- Click the **Add** button.

The **Create Position** page displays.



- Enter the applicable Position Number in the **Position Number** field.
- The **Effective Date** field defaults to the current system date. Update this date to the applicable effective date for the new position as needed using the **Calendar** icon and **MUST** be greater than or equal to the effective date of the position's Job Code.
Note: For further information on effective dating, refer to the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.
- Click the **Continue** button.



The **Create Position** page displays with the **Position Data** step of the Activity Guide (Step 1 of 4: Position Data) displayed by default.

Position Number DOCHR099
Headcount Status Open
Current Head Count 0

Step 1 of 4: Position Data

Effective Date 06/25/2020
Effective Sequence 0
Reason Code NEW

Review Date
*Position Months
Stmnt of Economic Interest Req'd ☐ No
VPA Covered ☐ No

Position Information

*Position Status Approved
*Status Active
Action Date 12/02/2020
Max Head Count 1
Status Date 12/02/2020
SOC Code / Extension
Job Sharing Permitted ☐ No
Available for Telework ☐ No
*EEO-4 Job Category
Workers' Comp Code

Alternate Work Schedule ☐ No
Key Position ☐ No
Budgeted Position ☒ Yes
Confidential Position ☐ No

Related Information
No Position data Available

Note: Various field can be (or must be) entered on the **Position Data** step of the **Create Position Activity Guide**. It is important to review all of the fields on each step (in order) as some fields are dependent on others.

Position Data Header Fields:

Field	Required	Value	Description	Comments
Effective Date	Y	Date	Effective dates are used to store historical, current, and future information for the position	Read-only. Defaults from previous entry.
Effective Sequence	Y	Incremental Number	Effective sequence tracks the sequence of changes in rows with the same effective date for transactional history	Read-only. Systematically assigned as applicable
Reason Code	Y	Code	Action Reason Code used to describe the type of changes being made to the position.	Read-only. Defaults from previous selection on the Request Details page. Defaults to NEW when creating or cloning a position.



Human Resources Job Aid

HR351 Managing Position Data

Field	Required	Value	Description	Comments
Review Date	N	Date	Next date the position is to be reviewed due to prevailing circumstances at the time of establishment (e.g., funding from sources of an indeterminate duration)	Optionally enter/select a review date for the position
Position Months	Y	Numeric	Number of Months per Year that the position will be filled	Enter the number of Months per Year that the position will be filled
Stmnt of Economic Interest (SOEI) Req'd	Y	Yes/No	Y = Yes: Statement of Economic Interest is required N = No: Statement of Economic Interest not required	Defaults to "No". Update as needed
VPA Covered	N	Yes/No	This field will indicate if the position is covered by the Virginia Personnel Act (VPA) For all classified positions, this must be changed to Y to populate on reports.	Defaults to "No". Update as needed



Human Resources Job Aid

HR351 Managing Position Data

Position Information section screenshot:

Position Information

*Position Status:

*Status:

Action Date:

Max Head Count:

Status Date:

SOC Code / Extension:

Alternate Work Schedule: ☐ No

Job Sharing Permitted: ☐ No

Available for Telework: ☐ No

Budgeted Position: ☒ Yes

*EEO-4 Job Category:

Confidential Position: ☐ No

Workers' Comp Code:

Position Information fields:

Field	Required	Value	Description	Comments
Position Status	Y	Approved Frozen Proposed	Current status of the position	Defaults to "Approved". Update as needed. Proposed is not applicable. Frozen positions continue to populate and count towards strength reports.
Max Headcount	Y	Numeric	The number of employees that can assigned to the position (positions normally have a one-to-one relationship with employees unless the position permits job sharing or can be assigned to multiple incumbents.	Defaults to "1". Update to the applicable count if the position permits job sharing or can be assigned to multiple incumbents.
Status	Y	Active/Inactive	Current status of "Active" or "Inactive" for the position	Defaults to "Active". Inactive positions do not populate to strength reports.



Human Resources Job Aid

HR351 Managing Position Data

Field	Required	Value	Description	Comments
				Positions cannot be abolished in Cardinal, use Inactive instead.
Status Date	N	Date	Date that the current status was applied to the position	Defaults to the current system date. Update as needed
Action Date	N	Date	Provides the date for the update action	Defaults to the current system date. Update as needed
Alternate Work Schedule	N	Yes/No	Designates whether the employee is actively working an Alternate Work Schedule. This field must be set to "Y" before the Employee Alternate Work Schedule field can be set to "Y" on the Job record	Defaults to "No". Update as needed
SOC Code/Extension	Y	Numeric (ignore punctuation) Ex: 11-1021.125 SOC code is 111021125	Used to identify the Federal Standard Occupational Classification (SOC) code	This field is required for Classified employees. Optional field to designate a specific extension to the SOC and COVA specific extensions code. This is not system required and the action will save without the SOC code but must be entered for all VPA positions.



Human Resources Job Aid

HR351 Managing Position Data

Field	Required	Value	Description	Comments
Key Position	N	Yes/No	Indicates whether the position is a key position	COVA is not currently using this field.
Budgeted Position	Y	Yes/No	Indicates whether the position is part of the agency budget	Defaults to "Yes". Update as needed
Job Sharing Permitted	N	Yes/No	Indicates whether job sharing is permitted for the position	Defaults to "No". Update as needed
Confidential Position	N	Yes/No	Indicates whether the position is a confidential position. (e. g. Undercover officers)	Defaults to "No". Update as needed. If confidential position is checked, the position nor incumbents will be reported out in the Active directory or employee directory extracts.
Available for Telework	N	Yes/No	Indicates whether the position is available for telework	Defaults to "No". Update as needed
EEO-4 Job Category	Y	Values as mandated by the federal government	Equal Employment Opportunity Occupational Code (EEO). Federal code associated with this position. Code identifies the primary occupational activity of the employee	Select the appropriate EEO-4 Job Category.
Worker's Comp Code	N	Code	The Workers' Compensation hazard code identifies the type of work being performed for the	Optionally enter the applicable code



Human Resources Job Aid

HR351 Managing Position Data

Field	Required	Value	Description	Comments
			purpose of determining the agency's WC premium and claims experience modification factor. The codes are established by the NCCI	

Job Information section screenshot:

Job Information

*Business Unit: 15100 [Search] Department of Accounts *Full/Part Time: Full-Time [Dropdown]

*Job Code: [Text] [Search] Union Code: [Text] [Search]

*Regular/Temporary: [Dropdown] Short Title: [Text]

*Regular Shift: Not Applicable [Dropdown] Description: [Text Area]

*Title: [Text]

Job Information fields:

Field	Required	Value	Description	Comments
Business Unit	Y	5-Digit Numeric Code	Indicates the Business Unit associated with the position. The Business Unit drives the first three alpha-characters of the Position Number	Defaults to the user's business unit and can only be updated if the user has access to multiple Business Units. Currently the Agency number (3 digits with two 00s added at the end)
Job Code	Y	5-Digit Numeric Code and	Indicates the unique code and title	Prior to updating, make a note of the current values in the Regular/Temporary



Human Resources Job Aid

HR351 Managing Position Data

Field	Required	Value	Description	Comments
		associated Job Title	associated with a specific job	and Full/Part Time fields as these values may need to be re-applied after updating the Job Code. NOTE: This title is used for most reporting.
Regular/Temporary	Y	Regular Restricted Temporary	Indicates whether the position is regular, restricted, or temporary	Select the applicable value.
Regular Shift	Y	Defaults	This field is not utilized in Cardinal	Defaults to “Not Applicable”. Do not change
Title	Y	Defaults	Provides the Title associated with the Job Code	Update as needed to reflect the working title.
Full/Part Time	Y	Full-Time Part-Time Quasi	Indicates whether the position is a full-time, part-time, or quasi position.	If changing the position’s Job Code, this field will default to “Full-Time”. If the incumbent is a quasi or part-time employee, verify this field is updated. The Full time/Part time field on Position can and should be adjusted accordingly as used in PMIS today.
Union Code	N		This field is not utilized in Cardinal	



Human Resources Job Aid

HR351 Managing Position Data

Field	Required	Value	Description	Comments
Short Title	N	5-Digit Numeric Code	Defaults from the Job Code	Do not update.
Description	N	Defaults	Defaults from Job Code	Update as needed to reflect the working title. The KSA can be populated if desired. This field allows for more than 250 characters

Work Location section screenshot:

Work Location

*Reg Region United States

*Company

*Department

Location

Reports To

Supervisor Level

Dot-Line

Security Clearance

Supervisor Position

Appointed Category

Work Location fields:

Field	Required	Value	Description	Comments
Reg Region	Y	Defaults	Indicates the work location region	Defaults to "USA". Do not change as this effects Federal Government reporting
Company	Y	3 digit alpha-numeric code	Defaults from the Business Unit	Read-only. Same 3 characters used to establish the Position Number
Department	Y	3 - 5 digit numeric code	Indicates the position's department	Select the appropriate Department.

Field	Required	Value	Description	Comments
Location	Y	3-5 digit alpha-numeric code	Indicates the physical work location for the position (where the incumbent sits or works), which impacts whether the salary plan is SW or NV for classified salary grades. Location code also impacts Healthcare Plan eligibility coverage. If telework, consider and designate region of Commonwealth incumbent teleworks.	Select the appropriate Location. Location codes will determine COVA salary plans and benefits eligibility.
Reports to	Y	Position Number	Used to establish reporting relationships.	Enter/select the position's report to value (Position Number) This impacts Time and Attendance Approval.
Supervisor Level	Y	1 digit alpha-character code	Indicates the supervisory level for the position (Employee, Faculty, Manager, or Supervisor)	Enter/select the position's supervisor level
Dot-Line	N	Position Number	Used to indicate that this position has a dotted line reporting relationship to another position.	Enter/select the Position Number to which this position has a dotted line relationship as applicable Does not impact TA Approval.
Security Clearance	N	Code	Used to identify the required security clearance for the position holder as applicable	Not utilized in Cardinal



Human Resources Job Aid

HR351 Managing Position Data

Field	Required	Value	Description	Comments
Supervisor Position	N	Position Number	Provides the Position Number of the employee's daily/operational supervisor as applicable	Optionally enter/select the Position Number
Appointed Category	N	Governor Appointed Board Appointed Elected Official Legislative Not Applicable	Used to track Appointment Types	Defaults to "N/A". Update as needed



Salary Plan Information section screenshot:

The screenshot shows the 'Salary Plan Information' section with the following fields and values:

- Salary Admin Plan: AH
- Standard Hours: 40.00
- Work Period: W (Weekly)
- Grade: 121
- Step: (empty)
- Mon: 8.00
- Tue: 8.00
- Wed: 8.00
- Thu: 8.00
- Fri: 8.00
- Sat: (empty)
- Sun: (empty)

Salary Plan Information fields:

Field	Required	Value	Description	Comments
Salary Admin Plan	Y	2 digit alpha-character code	Defaults from Job Code As designated on Salary Plan table, which correlates with respective Job code. SET ID = STATE derives classified salary plan when respective job code is selected. Alternate Salary Plan requires DHRM approval and designation of Agency specific SET ID	Read-only
Grade	Y	Numeric code	Defaults from Job Code As designated on Salary grade table and correlates with Salary Plan/Job Code. For alternate salary plans with DHRM approved alternate grades, Only DHRM has access to designate a position with an Alternate Grade.	Read-only
Standard Hours	Y	Number (in Hours)	Defaults from Job Code	Defaults to 40 hours and will not be changed on the position
Step	Y	Numeric code	Defaults from Job Code Alternate salary plan and use of steps require agency	Update as needed



Human Resources Job Aid

HR351 Managing Position Data

Field	Required	Value	Description	Comments
			specific SET ID. Once alternate set ID is established, (PPS request) Agency will have ability to create steps within the min and max thresholds of the STATE Grade.	
Work Period	Y	Defaults	Defaults from Job Code	Do not change. Daily hours fields can be viewed if the work period is "Weekly". This does not impact the schedule the employee will work in TA.

Note: The **Specific Information** section is not utilized in Cardinal.

USA section screenshot:

Specific Information
USA

FLSA Status Nonexempt

Bargaining Unit 8888

Updated on Updated By

USA fields:

Field	Required	Value	Description	Comments
FLSA Status	Y	Defaults	Fair Standards Labor Act (FLSA) Values are "Nonexempt" or "Exempt"	This will need to be correct because it will impact PY and TA if using the functionality. It will impact reporting for all Agencies.
Bargaining Unit	Y	Defaults to "8888"	This field is not utilized in Cardinal	Do not change

6. Click the **Next** button in the top right-hand corner of the **Position Data** page.



The **Create Position** page refreshes with the **Specific Information** step of the Activity Guide (Step 2 of 4: Specific Information) displayed.

Note: There are various fields that can be updated on the **Specific Information** step of the Manage Position Activity Guide. Regardless of the specific update required, it is important to review all of the fields on each step (in order) because some of the fields have dependencies on other fields when making updates. The following screenshots and tables provide a brief description of each field (by section) along with other important information regarding whether updates can be made and any dependencies on other fields as applicable.

Specific Information section screenshot:

Position Number: DOCHR099
Headcount Status: Open
Current Head Count: 0

Step 2 of 4: Specific Information

Effective Date: 06/25/2020
Reason Code: NEW New Position
Effective Sequence: 0
Approval Status: Not Available

Specific Information

Mail Drop ID:
Telephone:
Drug Program:
Signature Authority:
Privatization:
Agency Use 1:
License 1:
Agency Use 2:
License 2:
Agency Use 3:
License 3:
Physical Requirements:
Fingerprinting Required:
Certifications:
Safety Sensitive Position:
Language:
Critical/Hard to Hire:
Comments:

Specific Information fields:

Field	Required	Value	Description	Comments
Mail Drop ID	N	Mail Drop ID	Used to enter the mail drop ID assigned to this position if applicable	Optionally enter as applicable. Not utilized in Cardinal.
Telephone	N	Telephone Number	Used to enter the work phone number assigned to this position if applicable	Optionally enter as applicable. Not utilized in Cardinal.
Drug Program	N	Yes/No	Indicates if the position requires drug testing	Defaults to "No". Update as needed

Field	Required	Value	Description	Comments
Signature Authority	N	-	Indicates the signature authority assigned to the position if applicable	This field is not utilized in Cardinal
Privatization	N	Yes/No	Indicates if the position was abolished (inactive) because the position/job has been privatized	Defaults to "No". Do not update when creating a new position
Agency Use 1-3	N		Optional free form entry fields that can be used as desired by the agency to capture unique agency needs	Enter the applicable information in these fields as needed. Custom fields that have been built for the Commonwealth.
License 1-3	N		Optional fields that can be used by the agency to designate up to three licenses associated with the position	Enter the applicable license information in these fields as needed. Custom fields that have been built for the Commonwealth.
Physical Requirements	N	Yes/No	Used to indicate if there are any physical requirements (such as a requirement to lift heavy objects) for the position. It will default to N.	Defaults to "No". If updated to "Yes", enter the applicable information into the Comments field. Custom fields that have been built for the Commonwealth.
Fingerprinting Required	N	Yes/No	Used to indicate if fingerprinting is required for the position	Defaults to "No". Update as needed. Custom fields that have been built for the Commonwealth.



Human Resources Job Aid

HR351 Managing Position Data

Field	Required	Value	Description	Comments
Certifications	N	Yes/No	Used to indicate if there are any certifications required for the position	Defaults to "No". If updated to "Yes", enter the applicable information into the Comments field. Custom fields that have been built for the Commonwealth.
Safety Sensitive Position	N	Yes/No	Used to indicate whether the position is considered by the agency to be Safety Sensitive	Defaults to "No". Update as needed. Custom fields that have been built for the Commonwealth.
Language	N	Yes/No	Used to indicate if the position has a specific language requirement (other than English)	Defaults to "No". If updated to "Yes", enter the applicable information into the Comments field
Critical/Hard to Hire	N	Yes/No	Used to indicate that the position is critical/hard to fill due to market availability.	Defaults to "No". Update as needed To be used for exceptional recruitment/retention pay action verifications.
Comments	N		Free form field used to capture additional information regarding the position.	Not to be used for confidential information.

Note: The **Education and Government** section is not utilized in Cardinal.

- Click the **Next** button in the top right-hand corner of the page after all required reviews and updates are completed for the **Specific Information** page.

The **Manage Position** page displays with the **Budget Incumbents** step of the Activity Guide (Step 3 of 4: Budget Incumbents) displayed.



Human Resources Job Aid

HR351 Managing Position Data

Position Number DOCHR099
Headcount Status Open
Current Head Count 0

< Previous Next >

1 Position Data Visited

2 Specific Information Visited

3 Budget Incumbents Visited

4 Review and Submit Not Started

Step 3 of 4: Budget Incumbents

Effective Date 12/02/2020 Reason Code NEW New Position

Effective Sequence 0 Approval Status Not Available

Current Budget

Head Count 0 Amount 0.000

Current Budget FTE 0.00

Incumbents

Update Incumbents ☐ Yes ☒ No

Include Salary Plan/Grade ☐ Yes ☒ No

Force Update for Title Changes ☐ Yes ☒ No

Current Incumbents

No Incumbents to display.

Note: Although, most fields and data on the **Budget Incumbents** step of the **Manage Position Activity Guide** are read-only, it is still important to review every field. The following screenshot and table provide a brief description of each field along with other important information regarding whether updates can be made.

Budget Incumbents sections screenshot:

Current Budget

Earnings 0.000 Cdn Tax 0.000

Deductions 0.000 Total 0.00

Tax 0.000

Incumbents

Update Incumbents ☐ Yes ☒ No

Include Salary Plan/Grade ☐ Yes ☒ No

Force Update for Title Changes ☐ Yes ☒ No

Current Incumbents

1 row

Name	Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
HREE4 01HR0101	00900005400	0	Full-Time	40.00	05/07/2020	Rehire	Rehire	N	Job Data

Budget Incumbents fields:

Field	Required	Value	Description	Comments
Current Budget fields			Displays the current budget information for the position	Read-only
Update Incumbents	Y	Yes/No	Indicates whether the incumbents can be updated for the position	Read-only. Defaults to "Yes"



Human Resources Job Aid

HR351 Managing Position Data

Field	Required	Value	Description	Comments
Include Salary Plan/Grade	Y	Yes/No	Indicates whether to include a Salary Plan/Grade for the position	Read-only. Defaults to "Yes"
Force Update for Title Changes	Y	Yes/No		Not utilized in Cardinal
Current Incumbents			List the current incumbent (employee) linked to the position	Click the Job Data link on the right side of the incumbent data line to go to the current incumbent job data

- Click the **Next** button in the top right-hand corner of the page after all required reviews and updates are completed for the **Budget Incumbents** page.



Human Resources Job Aid

HR351 Managing Position Data

The **Create Position** page displays with the **Review and Submit** step of the Activity Guide (Step 4 of 4: Review and Submit) displayed.

Position Number DOCHR073
Headcount Status Open
Current Head Count 0

< Previous Submit

1 Position Data Visited
2 Specific Information Visited
3 Budget Incumbents Visited
4 Review and Submit Visited

Step 4 of 4: Review and Submit

Effective Date 07/30/2020
Effective Sequence 0
Reason Code NEW
Approval Status Not Available

Summary Of Changes

Position Number DOCHR099
Headcount Status Open
Current Head Count 0

< Previous Submit

1 Position Data Visited
2 Specific Information Visited
3 Budget Incumbents Visited
4 Review and Submit Visited

Step 4 of 4: Review and Submit

Effective Date 12/02/2020
Effective Sequence 0
Reason Code NEW New Position
Approval Status Not Available

Key Information

Description	Proposed Value
Business Unit	15100
Department	10000
Job Code	00119
Max Head Count	1
Location Code	760
Company	DOA
Position Number	DOCHR099
Effective Date	2020-12-02
Effective Sequence	0

- Review the **Summary of Changes** section (**New Value** and **Old Value** column entries for field updated).

Note: This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking submit.

- If additional information is required, click the **Previous** button to navigate back to the applicable step(s).
- Click the **Submit** button if all updates are accurate.



The **Position Confirmation** page displays.

✓ The New Position Number DOCHR099 has been successfully created.	
Position Number	DOCHR099
Headcount Status	Open
Current Head Count	0 of 1
<div>Go to Position Details</div> <div>Go to Manage/Create Position</div>	

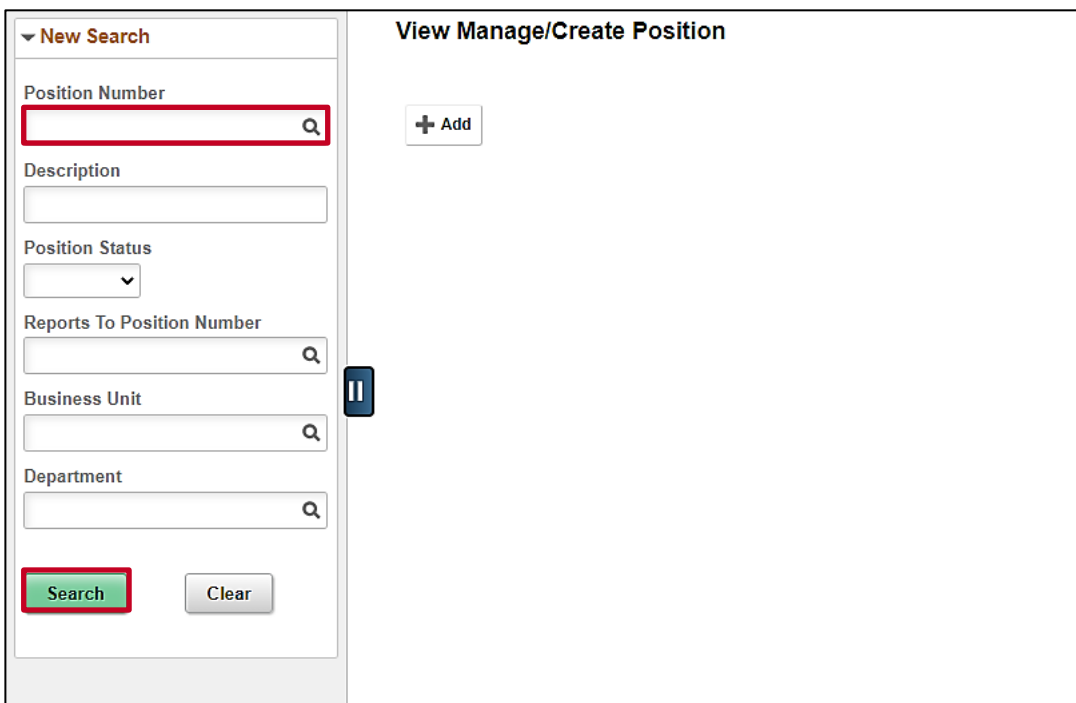
Note: Click the **Go to Position Details** button to return and view the updated information for the position or click the **Go to Manage/Create Position** button to create another position or search for another position and make changes.

Cloning a Position

1. To clone an existing position, navigate to the **Manage Position** page using the following path:

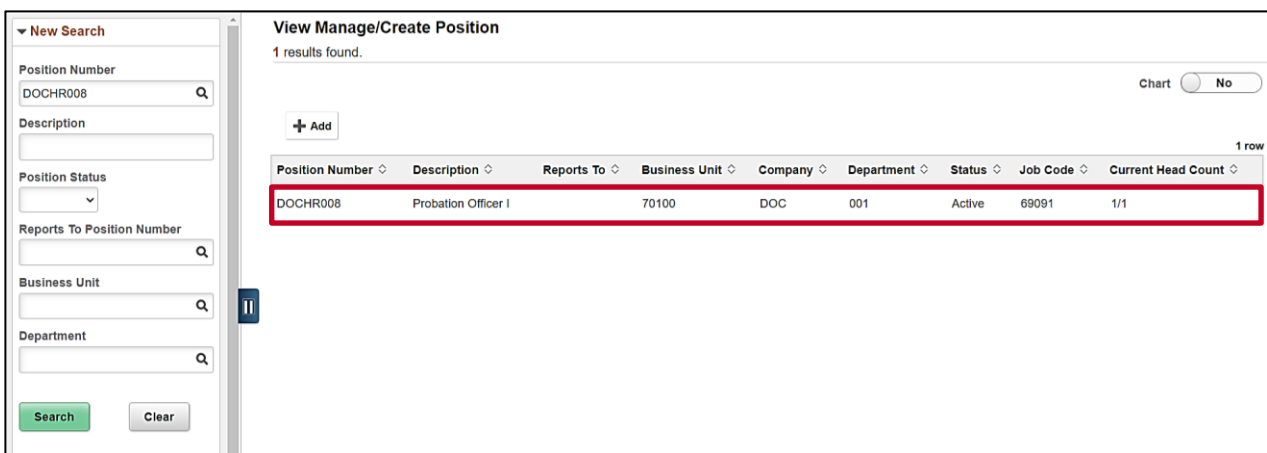
Navigator > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position

The **Manage/Create Position Search** page displays.



2. Enter the Position Number for the position to be cloned in the **Position Number** field.
3. Click the **Search** button.

The **Manage/Create Position Search** page refreshes with the search results displayed.



Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
DOCHR008	Probation Officer I		70100	DOC	001	Active	69091	1/1

4. Select the applicable position by clicking anywhere in the corresponding row.



The **Position Details** page displays.

Position Number DOCHR008 Headcount Status Filled Current Head Count 1 of 1								Clone
1 row								
+								
Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
05/06/2020	0	New Position	Dept of Corr - Central Admin	BOARD OF CORRECTIONS	Probation Officer I		Approved	Approval Chain

- Click the **Clone** button.

The **Clone** page displays in a pop-up window.

Cancel	Clone	Continue
*Position Number <input type="text"/>		
*Effective Date <input type="text" value="12/08/2020"/>		
Effective Sequence 0		
Reason NEW New Position		

- Enter the new Position Number in the **Position Number** field.
- The **Effective Date** field defaults to the current system date. Update to the new position's applicable effective date as needed using the **Calendar** icon. This date needs to be greater than or equal to the effective date of the position's Job Code.

Note: For further information on effective dating, refer to the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- Click the **Continue** button.



Human Resources Job Aid

HR351 Managing Position Data

The **Clone Position** page displays with the **Position Data** step of the Activity Guide (Step 1 of 4: Position Data) displayed by default.

Position Number DOCHR098
Headcount Status Open
Current Head Count 0

Next >

1 Position Data
Visited

2 Specific Information
Not Started

3 Budget Incumbents
Not Started

4 Review and Submit
Not Started

Step 1 of 4: Position Data

Effective Date 12/08/2020
Effective Sequence 0
Reason Code NEW

Review Date

*Position Months

Stmt of Economic Interest Req ☐ No

VPA Covered ☐ No

Position Information

9. The information for the position defaults based on the position from which it was cloned. Review all information and make necessary updates. Submit the new position after all information is reviewed and necessary updates are completed on the various position pages.
10. Click the following link to navigate to the screenshots and tables found in the Manage Position section of this Job Aid, which provide a brief description, important information, and dependencies (as applicable) for each field. [Position Data Header Fields](#)

After reviewing the new position's information, the **Create Position** page displays with the **Review and Submit** step of the Activity Guide (Step 4 of 4: Review and Submit) displayed.

Position Number DOCHR098
Headcount Status Open
Current Head Count 0

< Previous Submit

1 Position Data
Visited

2 Specific Information
Visited

3 Budget Incumbents
Visited

4 Review and Submit
Visited

Step 4 of 4: Review and Submit

Effective Date 12/08/2020
Effective Sequence 0
Reason Code NEW New Position
Approval Status Not Available

Summary Of Changes

Description	Proposed Value	Current Value
Action Date	2020-12-08	2020-05-06
Health Certificate	N	

12. Review **Summary of Changes** section (**Proposed Value** and **Current Value** column entries for field updated).

Note: This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking submit.

13. If additional information is required, click the **Previous** button and navigate back to the applicable step(s).

14. Click the **Submit** button after verifying all information.

The **Position Confirmation** page displays.

✓ The New Position Number DOCHR098 has been successfully created.	
Position Number	DOCHR098
Headcount Status	Open
Current Head Count	0 of 1
<div>Go to Position DetailsGo to Manage/Create Position</div>	

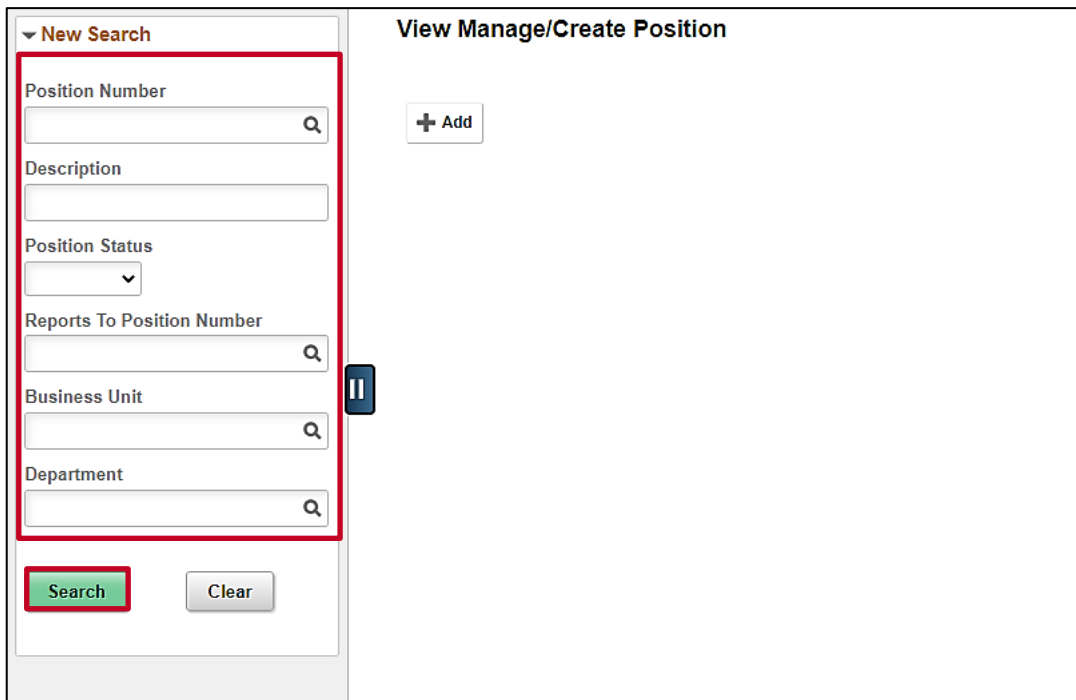
Note: Click the **Go to Position Details** button to return and view the updated information for the position or click the **Go to Manage/Create Position** button to create another position or search for another position and make changes.

Update Existing Employee Position Data

1. To update an existing position for an employee, navigate to the **Manage Position** page using the following path:

Navigator > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position

The **Manage/Create Position Search** page displays.



The screenshot shows a web interface for managing positions. On the left, there is a sidebar titled 'New Search' with several search criteria: Position Number, Description, Position Status (a dropdown menu), Reports To Position Number, Business Unit, and Department. Each criterion has a text input field and a magnifying glass icon. At the bottom of the sidebar is a green 'Search' button and a grey 'Clear' button. The main content area is titled 'View Manage/Create Position' and contains a '+ Add' button. A blue pause icon is visible between the sidebar and the main area.

Note: Users will only see approved positions granted by their security access.

2. Search for the applicable position using the fields on the left sidebar.

Note: All positions within the applicable parameter display if the **Business Unit** or **Department** fields are entered. If the Position Number is unknown, select “**Approved**” using the **Position Status** drop-down menu to retrieve a list off all accessible positions within the selected search parameters.

3. Click the **Search** button.



Human Resources Job Aid

HR351 Managing Position Data

The **Manage/Create Position** page refreshes and the search results display.

View Manage/Create Position
33 results found.

Search Filters:

- Position Number: []
- Description: []
- Position Status: Approved
- Reports To Position Number: []
- Business Unit: 70100
- Department: 125

Table Columns: Position Number, Description, Reports To, Business Unit, Company, Department, Status, Job Code, Current Head Count

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
DOC00032	11045 Prog Supp Tech	DOCED006	70100	DOC	125	Active	19013	1/1
DOC00399	23421 Workers Comp Mgr	DOC01104	70100	DOC	125	Active	19221	1/1
DOC00507	26141 Procurement Spec	DOC01071	70100	DOC	125	Active	19151	0/1
DOC00509	26141 Procurement Spec	DOC01071	70100	DOC	125	Active	19151	1/1
DOC00900	26142aProcurement Spec Sr	DOC01071	70100	DOC	125	Active	19152	1/1
DOC01071	26104 Purchasing Mgr	DOCED006	70100	DOC	125	Active	19155	1/1
DOC01104	74016 Risk Mgmt Dir	DOCED006	70100	DOC	125	Active	68034	1/1

- Select the applicable position by clicking anywhere in the corresponding row.

Note: The current head count for the position should be 1/1.

The **Position Details** page displays.

Position Details
Position Number: DOCHR022
Headcount Status: Filled
Current Head Count: 1 of 1

Table Columns: Effective Date, Effective Sequence, Reason, Business Unit, Department, Job Code, Location, Status, Approval Chain

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	New Position	Dept of Corr - Central Admin	PROCUREMENT & RISK MGMT	Security Officer III	Central Regional Office	Approved	Approval Chain

- Click the **Expand** icon (>) at the end of the row for view only pages of position or the **Add a New Row** icon (+) to create a new effective dated row in order to make a change to the position.

When clicking to add a row, the **Request Details** page displays in a pop-up window.

Request Details

*Effective Date: 05/29/2020

Effective Sequence: 0

Reason Code: []

Buttons: Cancel, Continue

- The **Effective Date** field defaults to the current system date. Update as needed using the **Calendar** icon.

Note: For further information on effective dating, refer to the Job Aid titled **HR351 Overview of Effective Dating** located on the Cardinal website in **Job Aids** under **Learning**.



- The **Effective Sequence** field is read-only and auto-populates based on the effective date. Select the applicable Action Reason Code using the **Reason Code Look Up** icon.

Note: For further information on Action Reason codes, refer to the Job Aid titled **HR351 Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.

Cancel Request Details Continue

*Effective Date 05/29/2020

Effective Sequence 0

Reason Code UPD Position Data Update

- Click the **Continue** button.

The **Manage Position** page displays with the **Position Data** step of the Activity Guide (Step 1 of 4: Position Data) displayed by default.

Position Number DOCHR022
Headcount Status Filled
Current Head Count 1 of 1

Next >

1 Position Data Visited

2 Specific Information Not Started

3 Budget Incumbents Not Started

4 Review and Submit Not Started

Step 1 of 4: Position Data

Effective Date 05/29/2020

Effective Sequence 0

Reason Code UPD

Review Date

*Position Months 12.00

Stmt of Economic Interest Req No

VPA Covered Yes

Position Information

*Position Status Approved

*Status Active

Action Date 12/08/2020

Max Head Count 1

Status Date 05/06/2020

SOC Code / Extension

Alternate Work Schedule No

Job Sharing Permitted No

Note: There are various fields that can be (or need to be) entered on the **Position Data** step of the Create Position Activity Guide. It is important to review every field on each step (in order) because some fields are dependent upon others.

- Click the following link to navigate to the screenshots and tables found in the Manage Position section of this Job Aid, which provide a brief description, important information, and dependencies (as applicable) for each field. [Position Data Header Fields](#)



The **Create Position** page displays with the **Review and Submit** step of the Activity Guide (Step 4 of 4: Review and Submit) displayed.

Position Number DOCHR022

Headcount Status Filled

Current Head Count 1 of 1

< Previous

Submit

1 Position Data
Visited

2 Specific Information
Visited

3 Budget Incumbents
Visited

4 Review and Submit
Visited

Step 4 of 4: Review and Submit

Effective Date 05/29/2020

Reason Code UPD Position Data Update

Effective Sequence 0

Approval Status Not Available

Summary Of Changes

Description	Proposed Value	Current Value
Reason Code	UPD	NEW
Action Date	2020-12-08	2020-05-12

10. Review **Summary of Changes** section (**Proposed Value** and **Current Value** column entries for field updated).

Note: This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking submit

11. If additional information is required, click the **Previous** button and navigate back to the applicable step(s).
12. Click the **Submit** button after verifying all information.

The **Position Confirmation** page displays.

✓ The Position Number DOCHR022 has been successfully updated.

Position Number DOCHR022

Headcount Status Filled

Current Head Count 1 of 1

Go to Position Details

Go to Manage/Create Position

Note: Click the **Go to Position Details** button to return and view the updated information for the position or click the **Go to Manage/Create Position** button to create another position or search for another position and make changes.